

Quick Reference Guide - Version 3.0

Transfer of Claim - The process of transferring a claim interacts with the claims register.

Step	Action
1	Click on Bankruptcy > Claim Actions .
2	Enter the Case Number in yy-nnnnn format - Choose the Transfer of Claim event - Click Next . Bypass Joint Filing With Other Attorney(s) - click Next .
3	Select Party: If the creditor is not listed click on Add/Create New Party <ul style="list-style-type: none"> • if the party's name appears, highlight and click (select name from list) • identify appropriate role type • if the party's name does not appear, click Add New Party button and complete information
4	Click Browse to locate and verify the document to be attached, Click Next .
5	The transferee is entered on the first section of the screen <ul style="list-style-type: none"> • Choose Search Creditors • if there is a match, the creditor can be chosen as the recipient or new owner of the claim, if the creditor is not on the creditor matrix, select Add New Creditor button
6	The transferor who originally filed the claim should be on the creditor matrix <ul style="list-style-type: none"> • If there is more than one match, select the correct one • Once this creditor claimant is selected, that name and claim number will appear on the screen • It is not possible to edit the Transferor selected of Claim number field - Choose Next
7	The claim number must be entered here.
8	The status will appear, highlight Transfer - click Next (<i>The status will appear on the Claims Register</i>).
9	Verify Docket Text - click Next . The Notice of Electronic Filing screen appears and your transaction is complete.